



Individual / Joint Account Information – Update / Amendment Form
個人 / 聯名賬戶資料 - 更新 / 更改表格

Account Name
客戶名稱

Account No.
客戶帳號

Particulars of the Client 客戶資料

Change In address 地址變更	<input type="checkbox"/> Residential address 住宅地址	<input type="checkbox"/> Correspondence address 通訊地址					
New address 新地址							
If your residential address is changed, please provide address proof of the last 3 months 如住宅地址有變更，請提供最近3個月住址證明							
Contact No. 聯絡電話	<input type="checkbox"/> Amend 更改	<input type="checkbox"/> Add 新增	<input type="checkbox"/> Delete 取消	Email Address 電郵地址	<input type="checkbox"/> Amend 更改	<input type="checkbox"/> Add 新增	<input type="checkbox"/> Delete 取消
1. _____				1. _____			
2. _____				2. _____			

Bank Account 銀行資料

<input type="checkbox"/> Amend 更改	<input type="checkbox"/> Add 新增	<input type="checkbox"/> Delete 取消
Currency 貨幣	Bank Name 銀行名稱	Account No. 賬戶號碼

Internet Trading Services 使用互聯網買賣服務

<input type="checkbox"/> Yes, I/ we have read and acknowledge the terms and conditions of 《Schedule II - Terms For On-Line Trading》 of Client Agreement and Schedules thereto. 是，本人/吾等已參閱及知悉載於客戶協議書及附件內《附表二 網上證券交易條款》的條款及條件。	<input type="checkbox"/> Cancel 取消	
Authentication Mode 認證模式	<input type="checkbox"/> SMS 電話短訊	<input type="checkbox"/> Software Token 軟件保安編碼

Statement Delivery 取收結單方式

<input type="checkbox"/> By email, I/ we acknowledge that no hard copy of the combined daily and monthly statement of account will be sent by Ever-Long Securities Company Limited. 以電郵收取，本人/吾等知悉長雄證券有限公司不會發出印刷版的綜合日結單及月結單。	<input type="checkbox"/> By Post 以郵遞收取
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Change of Account Type 更改賬戶類型

<input type="checkbox"/> Cash Account to Margin Account 由現金賬戶轉為保證金賬戶 Please close out my/our Cash Account and open a Margin Account for me/ us. I/We have read and understand the provisions of the Client Agreement and Schedules 《Schedule I – Terms for Margin Trading》 and agree to be bound at the same. 請為本人/吾等取消現金賬戶並開立保證金賬戶，本人/吾等已經閱讀並明白客戶協議書及附表《附表一 保證金融資買賣條款》，並同意接受這些條款的約束。
<input type="checkbox"/> Margin Account to Cash Account 由保證金賬戶轉為現金賬戶 Please close out my/our Margin Account and open a Cash Account for me/ us. I/We have read and understand the provisions of the Client Agreement and Schedules thereto and agree to be bound at the same. 請為本人/吾等取消保證金賬戶並開立現金賬戶，本人/吾等已經閱讀並明白客戶協議書及其附表，並同意接受這些條款的約束。
<input type="checkbox"/> Close out my/our Account 結束賬戶

Change of Account Executive 轉換客戶經紀

I/ We request your Company to change my Account Executive
本人/吾等現要求貴公司更改經紀

	Name of A.E. 經紀名稱	A.E. Code 經紀編號
From 由		
To 轉至		

Other Information Update 其他資料更改

<input type="checkbox"/> Others (Please specify) 其他 (請列明)	_____
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Financial Information 財務資料

Name of Employer 僱主名稱:					
Occupation 行業:			Years in Occupation 從業年數:	Position 職位:	
Residence 住屋:	<input type="checkbox"/> Self-owned 自置物業 <input type="checkbox"/> Quarters 宿舍		<input type="checkbox"/> Mortgage 按揭物業 <input type="checkbox"/> Living with family 與家人同住	<input type="checkbox"/> Rented 租用物業	
Annual Income (HK\$) 每年收入 (港元)	<input type="checkbox"/> ≤ \$200,000	<input type="checkbox"/> \$200,001 – \$500,000	<input type="checkbox"/> \$500,001 – \$1,000,000	<input type="checkbox"/> \$1,000,001 – \$3,000,000	<input type="checkbox"/> \$3,000,001 – \$6,000,000 <input type="checkbox"/> ≥ \$6,000,001
Total Net Worth (HK\$) 資產淨值 (港元)	<input type="checkbox"/> ≤ \$200,000	<input type="checkbox"/> \$200,001 – \$1,000,000	<input type="checkbox"/> \$1,000,001 – \$3,000,000	<input type="checkbox"/> \$3,000,001 – \$5,000,000	<input type="checkbox"/> ≥ \$5,000,001
Ownership of assets / real estate 擁有資產 / 物業	<input type="checkbox"/> No 否	<input type="checkbox"/> Yes, details (e.g. real estate, time deposit) 擁有, 詳情 (如物業、定期存款)			
	<input type="checkbox"/> With financing 有借貸		<input type="checkbox"/> Without financing 沒有借貸		
Source(s) of wealth (✓ one or more) 財富來源 (可✓超過一項)	<input type="checkbox"/> Salary and/or bonus 薪金及/或花紅 <input type="checkbox"/> Return on Investment 業務溢利 <input type="checkbox"/> Others (Please specify) 其他 (請註明) _____		<input type="checkbox"/> Saving 儲蓄 <input type="checkbox"/> Retirement funds 退休金		<input type="checkbox"/> Business Income 業務收入 <input type="checkbox"/> Inheritance or gift 遺贈或禮物
Source(s) of wealth (✓ one or more) 財富來源 (可✓超過一項)	<input type="checkbox"/> Hong Kong 香港 <input type="checkbox"/> Others (Please specify) 其他 (請註明) _____		<input type="checkbox"/> Macau 澳門		<input type="checkbox"/> China 中國

Investment Profile 投資概況

Investment Objective 投資目標	<input type="checkbox"/> Speculation 投機	<input type="checkbox"/> Capital Appreciation 資產增值	<input type="checkbox"/> Dividend / Interest Income 股息 / 利息收入	<input type="checkbox"/> Hedging 對沖	<input type="checkbox"/> Others 其他 _____
Investment Horizon 投資年期	<input type="checkbox"/> Short Term (< 1 year) 短線 (少於 1 年)	<input type="checkbox"/> Short to Medium Term (1 – 5 years) 中短線 (1 – 5 年)	<input type="checkbox"/> Medium Term (6 – 10 years) 中線 (6 – 10 年)	<input type="checkbox"/> Long Term (over 10 years) 長線 (10 年以上)	
Risk Tolerance 承受風險	<input type="checkbox"/> Low 低	<input type="checkbox"/> Medium 中	<input type="checkbox"/> High 高		

Client Acknowledgement 客戶確認

Any information provided in connection with this "Individual/ Joint Account Information - Update/ Amendment Form" is true, accurate, complete and up-to-date for the compliance with applicable legal and regulatory requirements. Please notify Ever-Long Financial Group immediately in writing of any change to any information that you previously provided to Ever-Long Financial Group. Ever-Long Financial Group may contact any persons or entities, including but not limited to banks, brokers or credit agencies for verifying the information provided (or any part of it). Ever-Long Financial Group may also contact Client to obtain relevant supporting documents for account information changes, like certified true copy(ies) of ID card/passport copies, CI/BR copies or Board Resolution copy etc. If the change(s) is/are significant, Ever-Long Financial Group may request Client to re-sign another account opening document with Ever-Long Financial Group.

為遵從適用法律及規管性之規定，任何關於此《公司賬戶資料 — 更新 / 更改表格》所提供的資料屬真實、準確、完整及最新。如以往所提供的資料有任何更改，請立刻以書面通知長雄金融集團。長雄金融集團可聯絡任何人士或實體，包括但不限於銀行、證券行或信貸機構以核實提供之資料(或其任何部份)。長雄金融集團可專人聯絡客戶，以便取得有關賬戶資料變更的證明文件。例如經驗證的身份証/護照副本、公司註冊証書/商業登記副本、或董事局會議紀錄副本，如有重大變更，長雄金融集團可要求客戶重新簽署另一份開戶文件。

Agreed and Confirmed 同意並簽署如下*



Client Signature and Company Chop 客戶簽署及蓋章

Date 日期 (DD 日 / MM 月 / YYYY年)

* same as the specimen on Client Information Form 請用客戶資料表之簽署式樣

For Office Use Only 只供內部使用

*** Please remind AE to update AE report if there is any substantial change in financial position / directorship / membership

Account Executive	Signature Verified by:	Checked by:	Authorized by: